A Smooth Migration from GIFTS to GivingData

Conrad N. Hilton Foundation

THE SITUATION

In 2014, the Conrad N. Hilton Foundation was ready for change – they'd realized that their grantmaking needs had grown beyond the capabilities of GIFTS, and they'd hired a new Director of Grants and Knowledge Management.

A strategic initiative was launched to identify and implement a more sophisticated grants management platform, and to introduce new processes to improve operational efficiency and support the foundation's growth.

The Foundation needed a partner who could deliver both a powerful, modern GMS and strategic consulting to support them through concurrent change management.

THE REQUIREMENTS

With assets of $2.5 billion and over $100 million awarded annually, the Conrad N. Hilton Foundation needed:

- A better user experience; for the Foundation and grantees
- Clearer budget tracking
- Scenario planning capabilities
- Practical, powerful reporting
- Simple and effective grantmaking intelligence sharing for the Board

THE SELECTION

GivingData was selected by the Hilton Foundation because of it's full-featured GMS, attractive user interface, easy integration with GIFTS, deep knowledge of grantmaking operations, and strategic approach to implementation.

"We are pleased to partner with GivingData," said Edmund Cain, Vice President of Grant Programs at the Conrad N. Hilton Foundation. "The project has improved our access to grant information and created structures for more sophisticated knowledge management. As we focus on organizational learning, the GivingData platform is a key tool for our foundation."

GivingData

THE SOLUTION

To streamline the implementation and ensure smooth adoption, GivingData recommended a phased approach, gradually deploying new features over a right-sized timeline for Hilton.

First, GivingData installed turn-key analytics, budget management, and scenario planning extensions for GIFTS, immediately providing the foundation with vastly improved access to their GIFTS data.

At the same time, staff began exploring new forecasting and planning capabilities, helping to set a vision for the foundation's post-GIFTS future. While adoption of GivingData as a GIFTS overlay continued to grow, the GivingData team initiated a more strategic engagement, designed to better understand the day-to-day needs of foundation staff. Using a well-defined methodology, GivingData facilitated workshops with foundation executives, program staff, and the grants management team. The conversations focused on user needs and helped define software development requirements and priorities.

The final phase of the engagement involved the design and implementation of new GMS functionality based on the user needs outlined in phase two. GivingData launched and refined several rounds of features while keeping GIFTS fully operational. The phased approach gave staff the opportunity to master one set of features at a time and incorporate new practices enabled by the software into their day-to-day work.

THE RESULT

The Hilton Foundation remains a GivingData user in 2021, and has identified many benefits of their GivingData use, including:

- Improved and extended access to grants data across the foundation and for the Board, minimizing the burden on program staff
- The ability to report on and analyze data to see trends that inform learning and decision-making
- Improved grant lifecycle, budget, and task management
- Fully integrated, cloud based document management
- Enhanced cross-program coding standards and practices
- APIs for publishing grants data to the foundation's website

GivingData